

## **Purpose:**

This planning guide is provided to agency campaign coordinators and agency chairs to help plan a smooth-running and effective agency campaign. It is based on best practices from agencies across the state and outlines ten steps to success. If you cannot find the answer to your question here, please check the website ([www.cvc.virginia.gov](http://www.cvc.virginia.gov)) or contact us at [CVCStaff@dhrm.virginia.gov](mailto:CVCStaff@dhrm.virginia.gov). Thanks for volunteering to help with this year's campaign!

## **STEP ONE: Enlist the Support of Your Agency Head and Managers**

**The support of your agency's leadership is essential to your campaign's success. Encourage your agency head to:**

1. Approve campaign goals and objectives.
2. Sign a letter to all employees asking them to consider contributing to the campaign. (See sample letter below.)
3. Endorse the campaign by hosting campaign events, group meetings, staff meetings, safety meetings, and make special presentations.
4. Ask managers to give their employees time to serve on the Campaign Committee or as volunteers and to participate in CVC special events.
5. Appoint next year's agency coordinator to serve as your co-coordinator.
6. Announce your role as agency coordinator to managers and ask them to support you.
7. Reward the staff and/or recognize them for their successes and hard work.

### *Sample letter from agency chair or agency director to agency employees*

Dear (Employee Name):

Have you ever provided a homeless family with a warm and safe place to sleep, or delivered a hot meal to a homebound senior? Have you ever given a group of kids a safe place to play away from the street, or helped a disabled adult realize their potential to be an active member of their community? If you have ever given to the CVC, the answer is "yes."

The Commonwealth of Virginia Campaign gives each of us an opportunity to create a positive change in our community. I give to the CVC because I believe that the agencies supported by the campaign are making a difference in many lives in our community, our country and around the world. This year we are focusing on making it possible for every employee to give. The "Virginia is for Givers" campaign slogan reflects the years of generous donations to CVC charities by state employees like you and me. You will hear more about this in the campaign video and in web messages.

Our agency's CVC campaign will kick off on \_\_\_\_\_. During the campaign, I encourage each of you to take a few minutes out of your busy day to attend a campaign event or hear a speaker from a local charity to learn about the vital services that nonprofit organizations are providing in our community. Please consider how you can participate in the campaign. Your gift, whether you are giving for the first time or are increasing last year's contribution, helps strengthen our community. 100% of your designated gift goes to the charities you choose from over 1,100 members.

Thank you for all that you do for our agency and our community. Together we make a Difference!

Sincerely,  
Agency Head Name

*If you wish to put this on CVC letterhead, please email us at [CVCStaff@dhrm.virginia.gov](mailto:CVCStaff@dhrm.virginia.gov)*

## **STEP TWO: Recruit Your Campaign Team**

Running a campaign could be a difficult task without the support of other key locations. Here are some ideas for sharing the workload and the fun!

### **1. Organize a Campaign Committee.**

Use a Campaign Committee to distribute the workload and keep enthusiasm high. The Committee can help you set your campaign goal, plan campaign events and recruit volunteers. The number of committee members depends on the size of your agency. When recruiting your team, consider including:

- Representatives from every department, division and/or location
- Employees who have worked on previous campaigns,
- Employees admired among their peers,
- Employees with specific expertise (human resources, marketing, public relations, etc.), and
- Last year's agency coordinator (to serve as a consultant).

### **2. Educate your team.**

Build an effective team by helping them get to know each other and educating them about the CVC. Help them understand their importance to the campaign effort.

- Take them on a tour of a local charity.
- Have representatives of your agency form a team and volunteer time painting, cooking, sorting canned goods, and many other activities at a charity of your choice – a great team building opportunity.
- Ask a representative from a local charity to speak at your first meeting.
- Watch the campaign video together at one of your meetings.
- Review the campaign materials.

### **3. Let the CVC Campaign Office help you.**

The CVC Campaign Staff work closely with all state agencies to help them plan their CVC campaigns. Take advantage of their experience and ideas and involve them in your campaign planning. Schedule permitting, we would like to attend one of your special events or help you plan an event or charity fair.

## **STEP THREE: Plan Your Campaign in Advance**

You should develop a comprehensive plan for your campaign, with your Campaign Committee. The following suggestions may help you:

**1. Meet with last year's agency coordinator to review the results of past campaigns and discuss the strengths and weaknesses of your agency's campaign. Ask the following questions:**

- What goal was set for last year's campaign and was it met? (Goals are set by agencies, not the CVC. Most agencies like to set a goal slightly higher than the previous year's totals.)
- What contributed to the success of the campaign?
- What challenges were faced?
- Are there any suggestions for improvement?
- Was your agency head supportive?
- Which employees were enthusiastic helpers and might be willing to help again?
- How was the campaign promoted?
- How has the work environment changed since last year?

**2. Review last year's numbers to determine where you may be able to increase your agency's employee giving. Information for last year's campaign is posted on the website, [www.cvc.virginia.gov](http://www.cvc.virginia.gov), on the Volunteers Tab.**

- How much was raised?
- How did the total increase/decrease compare to the previous year's campaign?
- What was the participation percentage (number of givers divided by number of employees)?
- What was the average gift (amount raised divided by number of givers)?

**3. Set a challenging, but realistic goal.**

Many agency coordinators are reluctant to set a goal for their agency because they feel that employees will feel pressured to give or that they will have failed in their job if their agency does not make its goal. Experience has shown us, however, that most people are motivated by a goal and feel that their gift counts more when it contributes to meeting a goal. Here are some questions to consider when setting a campaign goal for your agency:

- Will the number of employees at your agency have increased or decreased by time you run your campaign?
- Will a significant number of employees be retiring in the next few months? (These employees are likely to have given larger gifts in past campaigns.)  
Has your CVC campaign been growing or decreasing over the past five years? If it is increasing, at what rate?
- What is your participation rate? (If it is less than 65 percent, you have a lot of potential for growth by getting more employees to participate.)
- Remember, employees should be given an opportunity to give in person, online, or through the mail. Employees should never be asked to give by their agency head or direct supervisor in a way that implies they "have to give."
- Has your agency already incorporated a number of the "steps" outlined in this guide into its campaign, or is there potential for improvement?
- Have you planned special events to put the FUN into fundraising?

**4. Pick a slogan or theme for your campaign that connects to your agency.**

This is optional, but several agencies feel that having a slogan or theme for their campaign will help you focus marketing efforts and will help communicate a consistent message to all employees. While the overall theme for 2012-2013 is “Virginia is for Givers” you may think of something else that connects with your agency mission or service.

### **5. Organize your plan to distribute and collect pledge cards.**

The best way you can ensure that every employee has an opportunity to contribute to the campaign is to have an organized plan to distribute and collect pledge cards. By following these simple steps, you will increase your agency’s giving while making sure that no one who wants to give is left out.

- Remember that agencies do not have to use paper pledge cards. The online pledge processing system can streamline your paperwork by having each donor do their own pledge through the EmployeeDirect portal.
- Personalize pledge cards. Some agencies may choose to preprint pledge cards with agency code and employee name.
- Have an organized distribution/collection plan. Decide whether you are going to distribute/collect pledge cards at group meetings or individually through your volunteers. Do not ask employees to just drop their pledge cards in a box in human resources or elsewhere. Most of them will not make the effort. History has shown us that employees tend to give when there is contact with another coworker.
- Have one or two people responsible for processing cards and compiling reports. Appoint one or two members of the Campaign Planning Committee to process cards, report weekly totals to the Campaign Committee and compile final reports for the CVC Fiscal Processor. If you must deal with cash, have one person count the cash and the other person can verify the count.

### **6. Timing is everything!**

Sit down with a calendar and plan everything out with meeting dates and events as well as the distribution of articles that may be of interest to your coworkers. This will ensure that all members of your committee know when deadlines are to be met, and your campaign will stay on schedule. Additionally, you may want to limit your campaign to a few weeks to keep awareness and enthusiasm high. Also, check your agency’s calendar before you schedule your campaign to ensure that it will not conflict with other major events, conferences, or activities. Many colleges and universities avoid periods in the fall when high student interaction is required.

### **STEP FOUR: Make it Personal**

The most effective campaigns incorporate both group meetings and one-on-one contact. After a group meeting or other event, have campaign volunteers follow up individually with everyone. This “personal touch” allows you to answer the questions employees might not have felt comfortable asking at the meeting and share information with employees who were unable to attend.

## **1. Recruit Volunteers.**

The volunteers you recruit should be enthusiastic and committed. Every agency, department, division or location has those loyal, behind-the-scenes employees who keep things running smoothly. They are the people who are first to reach out to troubled coworkers or gather the troops to celebrate an employee's birthday. Everyone with whom they work respects them. These are the people you want for your campaign. Your volunteers will distribute and collect pledge cards and schedule one-on-one meetings with their coworkers. We recommend that volunteers be responsible for no more than 50 of their coworkers.

## **2. Train your Volunteers.**

Help them feel comfortable answering questions about the campaign and asking their coworkers to participate. Take them to tour a local charity. Invite charity representatives to speak at your training. The CVC Campaign Office can help you plan your volunteer training. Online self-study volunteer orientation is available at the CVC website.

## **STEP FIVE: Communicate the Need**

When employees understand the impact their gifts can make in the lives of people in our community, they feel more motivated to give and better appreciated. Help them make informed decisions about their charitable giving through the following:

### **1. Group Meetings**

In addition to one-on-one meetings with volunteers, give employees the opportunity to attend group campaign meetings and charity fairs. Invite representatives from local charities to speak and show the CVC DVD. There are many advantages to conducting group meetings:

- Information is provided quickly and efficiently.
- A consistent message is delivered.
- Less follow-up work is required.
- Meetings can be scheduled to accommodate the work schedule of a particular division, department or location.
- Employees are removed from the distractions of their work area.
- Employees can ask questions directly to CVC and charity representatives.
- You can schedule one or more meetings for all employees or let the Campaign Committee members or volunteers host group meetings for their departments, divisions or locations.
- Employee Donors may be more comfortable in a group setting than if you approach each one individually --- and some people feel just the opposite. Know your coworkers and respect their preferences, where known.
- Organize a charity fair where employees can put a face to the charity name. Employees attending charity fairs almost always connect with a charity that touches their heart.

## **Suggested Group Meeting Agenda**

- **Distribute pledge cards as employees enter room.**
- **Introductions**
  - By the Agency Campaign Coordinator, Campaign Committee Member or Volunteer
- **Endorsement**
  - By the Agency Head
- **Testimonials**
  - By Charity Representative or Agency Employee
- **Questions & Answers**
  - By Charity Representative and Agency Campaign Coordinator
- **Quick Review of Pledge Card and Directory**
  - By Agency Campaign Coordinator, Campaign Committee Member or Volunteer
- **Announcements**
  - (Upcoming Agency Campaign Coordinator, Campaign Committee Member or Volunteer Campaign Events, Drawings, etc.)
- **Thank You**
  - By Agency Campaign Coordinator, Campaign Committee Member or Volunteer
- **CVC Video**
  - You may want to introduce the DVD – it's short and has a good impact.
- **Provide employees the opportunity** to turn in their completed pledge card when they leave the meeting.

## **2. Staff Meetings**

Invite representatives from local charities or CVC volunteers (CVC Advisory Council Member or CVC Campaign Staff) to speak at weekly, monthly or quarterly staff meetings.

## **3. Tours**

Schedule tours of local charities for your employees.

## **4. Volunteer Projects**

Ask employees who volunteer at local charities to put together a daylong or half-day group project at their charity and help them recruit other volunteers.

## **5. Newsletters**

Devote an entire issue of your agency's newsletter to the CVC or run a series of stories on your campaign. You can send an email newsletter with links to new postings on the CVC webpage.

## **6. Testimonials**

Send out an e-mail to all employees asking if anyone has received services from a local charity (included in the directory) and if they would be willing to share their positive experience at a group meeting or in a newsletter article.

## **7. Brown Bag Lunches**

Invite employees to bring their lunch to a comfortable meeting room and listen to a speaker from a local charity or see the video in small informal gatherings.

## **9. Campaign Web Site**

Create a CVC web site to post your goal, event schedule and other important information about your campaign. Link it to the statewide CVC web site at [www.cvc.virginia.gov](http://www.cvc.virginia.gov).

### **10. E-mail Messages**

Send out weekly e-mail messages with important facts about local charities and/or the campaign before and during the campaign. You can include links to featured charities on the CVC website. In some agencies, it may work better to post weekly “emails” in a break area or somewhere employees without email will have an opportunity to read them.

### **STEP SIX: Get the Best Return for Your Efforts**

To ensure that all of your hard work brings success, the following tips are important components to your plan.

#### **1. Promote payroll deduction.**

A payroll deduction gift is generally seven to 10 times larger than the average cash gift.

#### **2. Educate.**

A small payroll deduction contribution can reap great rewards. Help employees understand the power of their donor dollars and the efficiency of giving through CVC.

### **STEP SEVEN: Make it Fun!**

Put the FUN in FUN(d)Raising Events.

#### **1. Kickoff Event**

A kickoff event is a terrific way to announce the start of your campaign and generate enthusiasm. Include a speaker from a local charity. Ask your agency head to host the event. Have the management team attend and make their pledges.

#### **2. Prize Drawings**

Hold drawings during your campaign to encourage employees to turn in their pledge cards.

#### **3. Sales and Auctions**

Ask employees to donate homemade goodies, crafts and personal services (such as pet sitting or lawn mowing) for a sale or auction.

#### **4. Theme Parties and Casual Days**

Pick your theme and incorporate it into events, decorations, publicity, dress, refreshments, etc. Encourage other employees to participate by awarding prizes for most creative costume, the spiciest chili, etc. Ask your agency head to authorize a special casual day. Many agencies have given employees an opportunity to buy “casual day” buttons at \$5 per day. Have a tailgate party during football or NASCAR seasons and sell tickets to the event.

#### **5. Employee Picnics**

Have everyone bring a favorite dish and hold competitive events. Use this opportunity to thank contributors. Ask a representative from a local charity to speak. Charities dealing with hunger issues are very appropriate for this type of event.

#### **6. Other Special Events**

Be creative. Run a putt-putt golf tournament, gather staff baby photos and give prizes for correct guesses of who’s who, or organize an employee talent show. Or how about having an ice cream social, an employee cook-off or an executive car wash? Fun activities like these draw interest and can help raise funds.

## **7. Competition**

Encourage friendly competition between divisions, departments or locations. Offer prizes for the most money raised or the largest number of contributors, the best bake sale or the most interesting group meeting. A very successful idea is to have a coin jar challenge among departments, floors, buildings, or locations. Drop coins in the jar each time you pass by.

**Note:** Special CVC fundraising events, such as auctions, bake sales, carnivals, athletic events, or other activities are permitted during the campaign period if approved by the appropriate agency head or government official and are consistent with the agency's ethics regulations. In all approved special fundraising events the donor may have the option of designating to a specific participating organization or federation or be advised that the donation will be counted as an undesignated contribution and distributed according to the regulations.

## **STEP EIGHT: Keep Awareness High**

In order to keep awareness high, it is important to report your progress throughout the campaign. Here are a few suggestions on how to get the word out:

### **1. Thermometers**

Post thermometers in each department, division and/or location to chart progress. Ask Campaign Committee members to update the thermometers for their area weekly. Order a large thermometer to post in your lobby or in the front of your building. A generic thermometer is on the Campaign Materials section of the CVC website.

### **2. E-mail Messages**

Send weekly e-mail updates to all employees.

### **3. Web Site**

Create a CVC web site and chart your progress electronically. Link to the CVC website.

### **4. Keep Your Agency Head and Managers Informed.**

You may report on the progress of a particular department, division or location, while maintaining the confidentiality of each person's contribution. According to the CVC guidelines established by the CVCAC, you may not share information about an individual employee's gift with their supervisor or anyone else. Get on the agenda for staff meetings and present progress reports.

### **5. Contact the CVC Campaign Office when you have a question, concern, or need a little boost.**

They are there to help you plan and coordinate your campaign. Keep them in the loop and they can help you troubleshoot if necessary.

## **STEP NINE: Show Your Appreciation**



One of the most important things to do at the end of your campaign is to thank volunteers and contributors for their involvement and concern for their community. Keep in mind that any “thank you” activity should occur promptly. Various ways to thank employees include:

- 1. Send personal notes to volunteers and contributors.**
- 2. Place a thank you notice in your agency’s newsletter.**
- 3. Send out e-mails or written fliers.**
- 4. Hold a thank you event for all contributors.**
- 5. Hang a giant thank you card or banner in your lobby or cafeteria.**
- 6. Ask your agency head to recognize volunteers and contributors at a staff meeting, thank you event, or through a letter.**
- 7. Nominate members of your team for statewide recognitions after the close of the campaign.**

Volunteer certificates are available at the end of the campaign to recognize your CVC team. In addition, nominations for your CVC stars are collected in February each year for state-wide awards. Categories for these awards include”

- Teamwork
- Innovation in the Campaign
- Use of Technology
- Community Connection
- Rookie of the Year
- CVC Champion

Nomination forms and guidelines for these rewards are published each February.

More Recognition ideas:

- The Department of Corrections held a “Director’s Reception and Appreciation Ceremony” to pass out the awards and provide recognition to employees. The University of Virginia held “A Celebration of Community Spirit and Recognition of Volunteers” luncheon to present awards and thank the volunteers that worked on the campaign.
- Distribute volunteer certificates at a staff meeting.
- Post “Thank You” notes on the door or cubicle entrance for each CVC volunteer.

**7. Give out a small recognition item to all contributors as a thank you.**

## **STEP TEN: Wrap It Up Neatly**

Your campaign experience will be more rewarding for you and your Campaign Committee if you make sure that the closing of your campaign is done just as well as the running of it. The more time you let pass, the more difficult it will be to recall numbers locate paperwork, etc. You've worked hard, so by all means, wrap up your campaign promptly and neatly knowing you've accomplished so much for your community!

- 1. Report campaign results to your agency head.**
- 1. Complete your final Pledge Transmittal Report (a copy is on the website) make a copy and return it to the Processing Center as listed on the transmittal.**
- 2. Special Transmittal Forms and Pledge Cards are available for special events.**
- 3. Give your payroll office copies of all payroll deduction pledge cards.**
- 4. Hold a critique meeting with your Campaign Committee and make note of recommendations for next year's agency coordinator.**

## **CVC JARGON**

**Pledge Card** - Used to record an employee's pledge amount, method of payment and charity designations. Distribute one to each employee at your agency.

**Online Giving** - Piloted in 2007, the new and improved 2008 online pledge processing system is available through EmployeeDirect. Employees can give by payroll deduction or by credit card.

**Directory** - Provides important information about the Commonwealth of Virginia Campaign as well as local, national and international charities approved to receive contributions from the campaign. Plan to order 1 directory for every 10 employees and place them in a shared area with extra pledge cards. A searchable directory is available on line at [www.cvc.virginia.gov](http://www.cvc.virginia.gov) then DONORS and then SEARCH FOR A CHARITY. You can find a charity by name, mission or services, regional sorts, even down to a zip code in which they are based.

## **Video (DVD)**

Produced internally as a joint state agency effort, the video can be used during campaign events, group meetings or staff meetings. The video may be viewed or downloaded from the CVC website.

## **Posters**

CVC posters are available to help you promote your campaign. We recommend one poster for every 50 employees. The winning art contest entry is converted to a snazzy, colorful, and eye catching poster. Put one in the elevator, outside your office door, in break rooms, and anywhere that employees gather.

## **Thermometers**

Post your campaign goal and chart your progress on a CVC thermometer. We recommend one for every department, division and location.

**Website [www.cvc.virginia.gov](http://www.cvc.virginia.gov)**

The CVC website has crucial information for donors and Coordinators. Check it out! Many new items have been added each year and more will be posted throughout the campaign.

**Speakers' Bureau**

The CVC Speakers' Bureau is a crucial resource and should be used to enhance your group meetings. Speaking engagements provide an excellent way to educate state employees about the charitable community. A list of charities willing to speak at state agencies is available.

**Materials Request Forms**

These forms are located on the CVC website, [www.cvc.virginia.gov](http://www.cvc.virginia.gov) . A basic set of forms will be sent to the agency coordinator of record at the beginning of the campaign and many forms are downloadable from the CVC website. More materials may be requested.

**CAMPAIGN CHECKLIST**

Suggestion: If you have access to Outlook or another task manager, enter the key milestone dates with reminders so that you can spread them across a longer period of time and not feel rushed (and get reminders when one is nearing the due date).

At the end of the Campaign:

1. Complete and send final Transmittal Report.
2. Check in desk drawers and cabinets to ensure that no packets have been set aside and temporarily forgotten.
3. Mail the pledge transmittal to: the CVC Processing Center (address is on the form. Be sure to make deposits of cash or convert into checks. Do not delay making that last drop.
4. **The pledge processor** is the Charitable Pledge Processing Center for the Commonwealth of Virginia Campaign.

Mailing address (also on the transmittal form)

CVC Pledge Processing Center  
Post Office Box 41069  
Norfolk, Virginia 23541-1069

For more information call the CVC office at 804-225-2212.